STAFF/TRADES DOCUMENTS

**Setting Criteria**
Employee
- Adds Goals
  - *Email Notification ➔ Sent to Manager each time goal is added and saved.*
Manager
- Edit/Add Goals, Responsibilities, Competencies and Customer Service items
- Clicks **APPROVE**
  - *Email Notification ➔ Sent to Employee that criteria has been established.*

**Completing Evaluation and Submitting for Approval**
Employee
- Completes Self Evaluation for WHOLE document
- Clicks **COMPLETE**
  - *Email Notification ➔ Sent to Manager that self-evaluation has been completed.*
Manager
- Completes Employees Evaluation for WHOLE document
- Clicks **SUBMIT FOR APPROVAL**
  - *Email Notification ➔ Sent to Sr Manager that evaluation has been submitted.*
Sr Manager
- Clicks **DENY** (document routes back to Mgr for edits for resubmitting for approvals)
  - *Email Notification ➔ Sent to Manager that evaluation has been denied.*
- Clicks **APPROVE** (document routes back to Mgr to share with EE)
  - *Email Notification ➔ Sent to Manager that evaluation has been approved.*

**Holding Review and Closing out Evaluation**
Manager
- Clicks **SHARE WITH EMPLOYEE**
  - *Email Notification ➔ Sent to Employee that evaluation has been shared.*
Employee
- Clicks **ACKNOWLEDGE**
  - If EE doesn’t acknowledge, Manager will override acknowledgement
  - *Email Notification ➔ Sent to Manager that employee has acknowledged evaluation.*

Once Employee clicks **ACKNOWLEDGE**, the document is automatically finalized.

**DOCUMENT IS FINALIZED AND STATUS SHOWS COMPLETED**